



Reaching the Consumer - In a Changing Lighting Landscape

October 23, 2017

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Trivia Question

In 1980, the market sold in almost 4 billion lamps. Half of these lamps were INC or LFL bulbs. Any idea what the other 2 billion were?



Technologies and Influences for Standard Aline Lamps



Incandescent



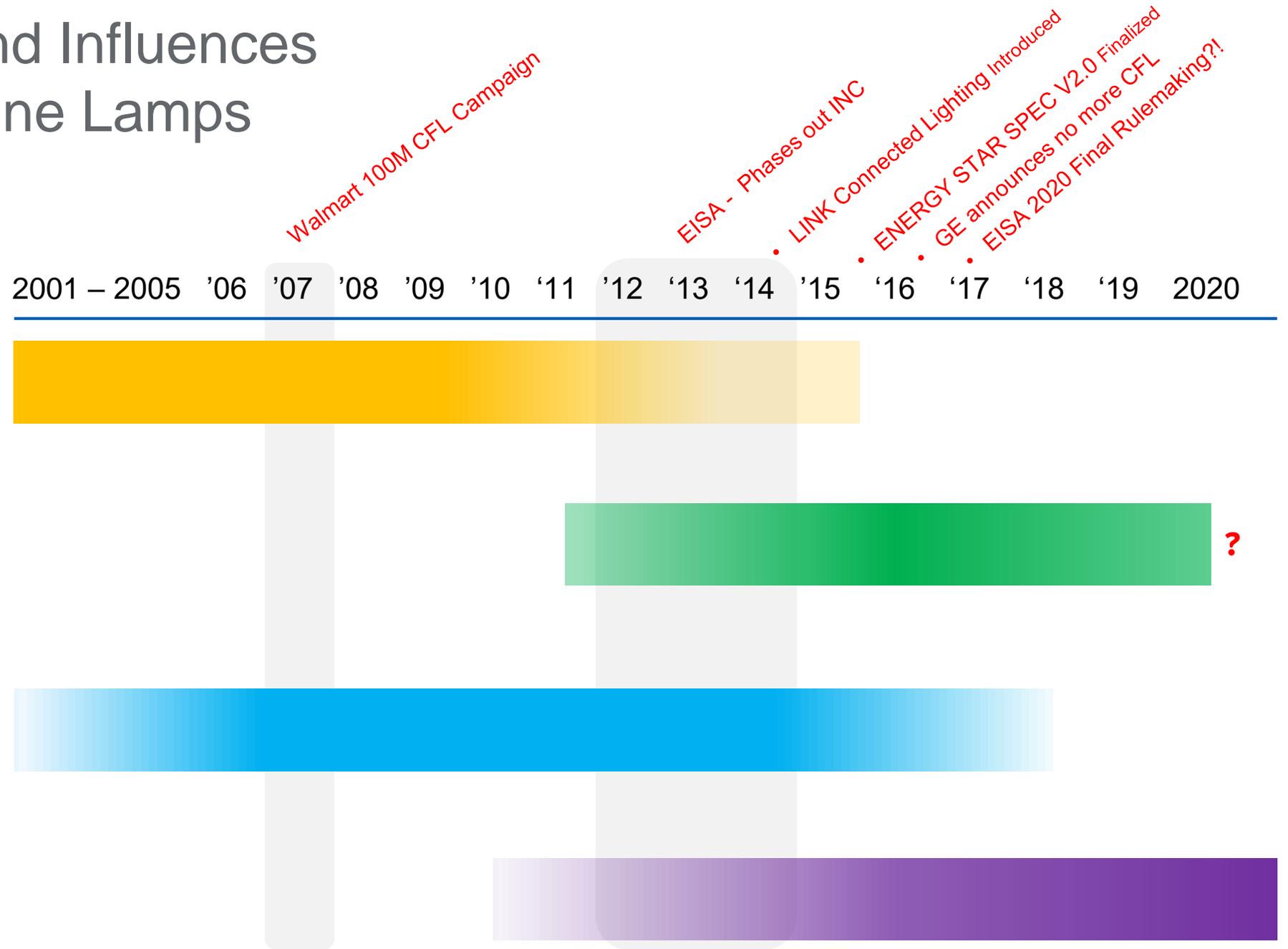
Halogen



CFL



LED

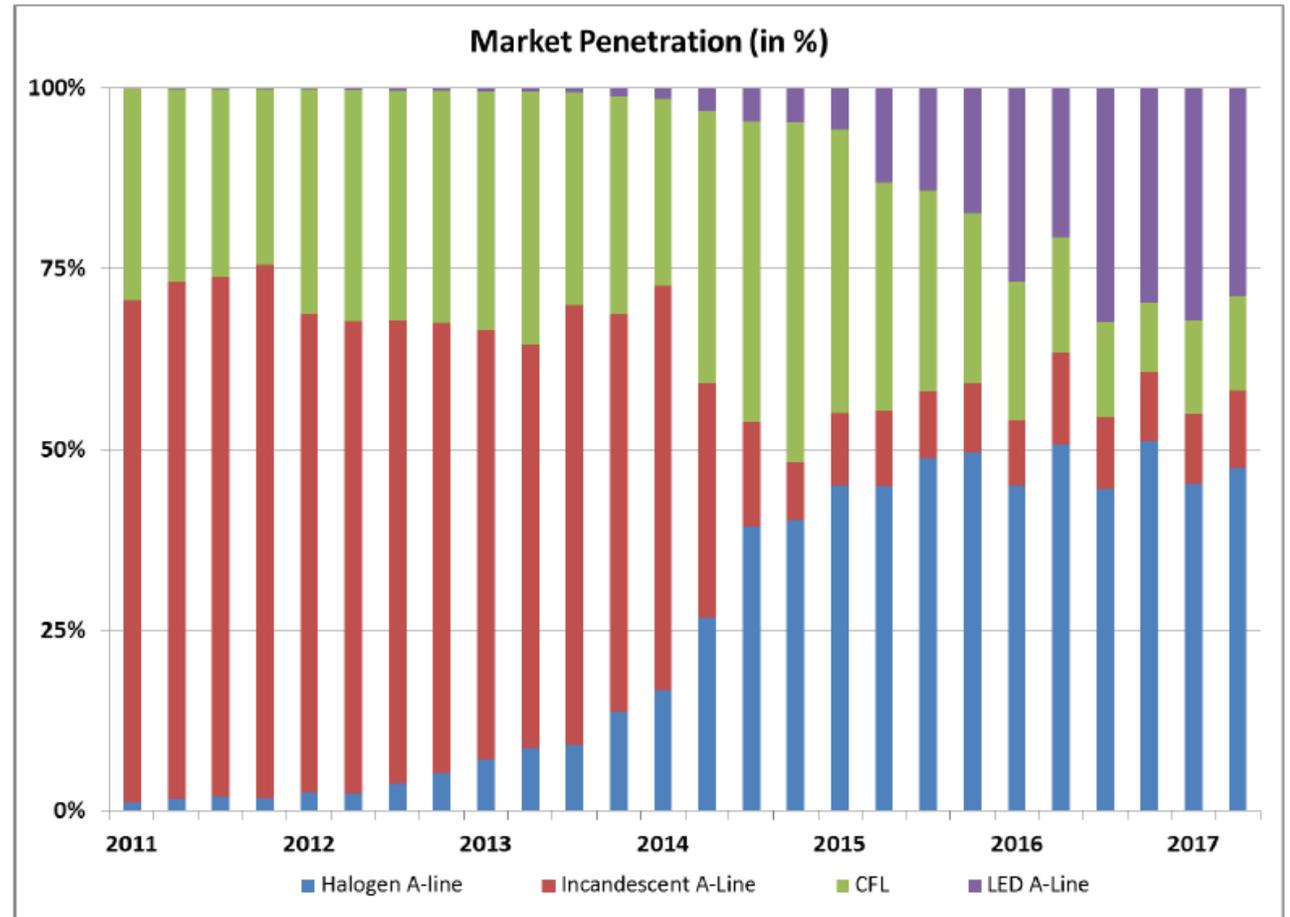


NEMA 2nd Q 2017 Update: A-Line

Halogen: 47.5%
Inc: 10.7% (historically 70% – 75%)
CFL: 13% (historically 25% - 35%)
LED: 28.8%

Quick growth of LED

Almost 60% of Aline lamps still
“inefficient”!



The Light Bulb Aisle Today

- Overall light bulb sales are shrinking
- Limited CFL options, cleaner mix with EEH and LED
- Many LEDs are new, less than a year old
- Transitioning from Consumable to Durable to Connected



The Home Depot



HD launch Q4 2016 – Q1 2017

- Endcaps with comparators
- Floor displays
- You Tube Video, for education and training



Target



Simplified Set

Well organized and easy to shop

Light Boxes for HD - color temperatures

47% of the LEDs planned for ENERGY STAR (majority already certified)!

Utility off shelf promotions supported with endcaps and floor displays



Examples of Inline Utility Signage



Walmart

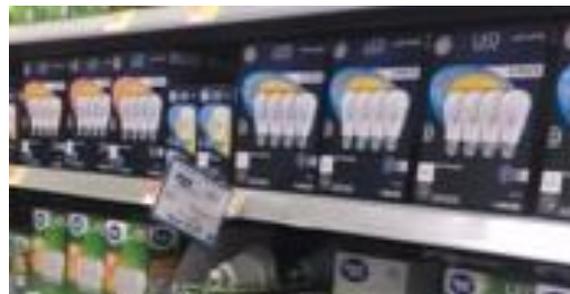


Variety of ENERGY STAR products
Full support of utility programs

- On shelf, endcaps and floor displays
- Light the Moment pallets!



2037/01/19



Light the Moment Pallets

Saves over \$80 on energy per bulb

Lasts 13 years

Instant on

see package for details



Left side



HELP PROTECT THE ENVIRONMENT

Replace your old, inefficient bulbs with ENERGY STAR and join us in:

- ✓ Saving \$566 million each year in energy costs.
- ✓ Preventing 7 billion pounds of carbon pollution.

Your Moments. Your World.
Light them with ENERGY STAR®



Learn more at:
www.energystar.gov/lightthemoment

Right side



Sam's Club



100% LED

All ENERGY STAR certified skus (except A15 and Reveal)

HD products

Utility in-store demos

Instant Savings Book features in 2017 - drives traffic to stores, helps promote utility discounts in store

Larger 'value' packs



Instant Savings Feature



Key Learnings

- Don't assume consumers know what we know
- LED is a better technology
- Education is still needed
- The CFL hangover...address the assumptions
- Still a runway for lighting programs
- Connected products are the next big shift





Imagination at work